



Consumer Foodservice By Location in Thailand

April 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail locations drive growth as shopping centres evolve into multi-purpose lifestyle destinations

INDUSTRY PERFORMANCE

Retail emerges as most dynamic non-standalone location

Operators focus on expansion of standalone foodservice

Delivery is a key growth driver

WHAT'S NEXT?

Retail locations to lead growth

Shifts in fulfilment will support sales through standalone locations

Lodging-based foodservice outlets offer potential as premium and experiential dining destinations

Urbanisation will support demand in high-density locations

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DISCLAIMER

Consumer Foodservice in Thailand - Industry Overview

EXECUTIVE SUMMARY

Consumers prioritise value, experience-led dining and delivery

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Value-for-money formats gain ground as Thai consumers navigate budget pressures

Eat-in remains dominant fulfilment mode while delivery gains popularity

Experiential dining becomes increasingly important

WHAT'S NEXT?

Polarisation will persist amid continued expenditure constraints

Localisation will emerge as key focus

Sustainability will remain a secondary consideration

COMPETITIVE LANDSCAPE

CP All PCL leads through 7-Eleven network

Lawson 108 and Mixue record strong performance through affordable high-frequency consumption

Operators focus on format efficiency and engagement-led innovation to drive growth

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Independent outlets maintain lead amid growing pressure from chains

Innovation remains key differentiator

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